

# ourshared Unity Microsoft CRM to SunSystems



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ourshared Unity orchestrates the posting of sales invoices and the creation of debtor accounts from Microsoft CRM into SunSystems via SQL and SOAP services. Bank reconciliations and allocations are made within SunSystems once a payment is received in the bank. Unity recognises that the transaction has been partially\fully paid (allocated) and then updates the status to paid including payment details within CRM



## Automatic Processing

Unity automatically pulls created or amended customer details from CRM and creates a Customer and address record in SunSystems. Once the record is created the sales invoices are posted to SunSystems.



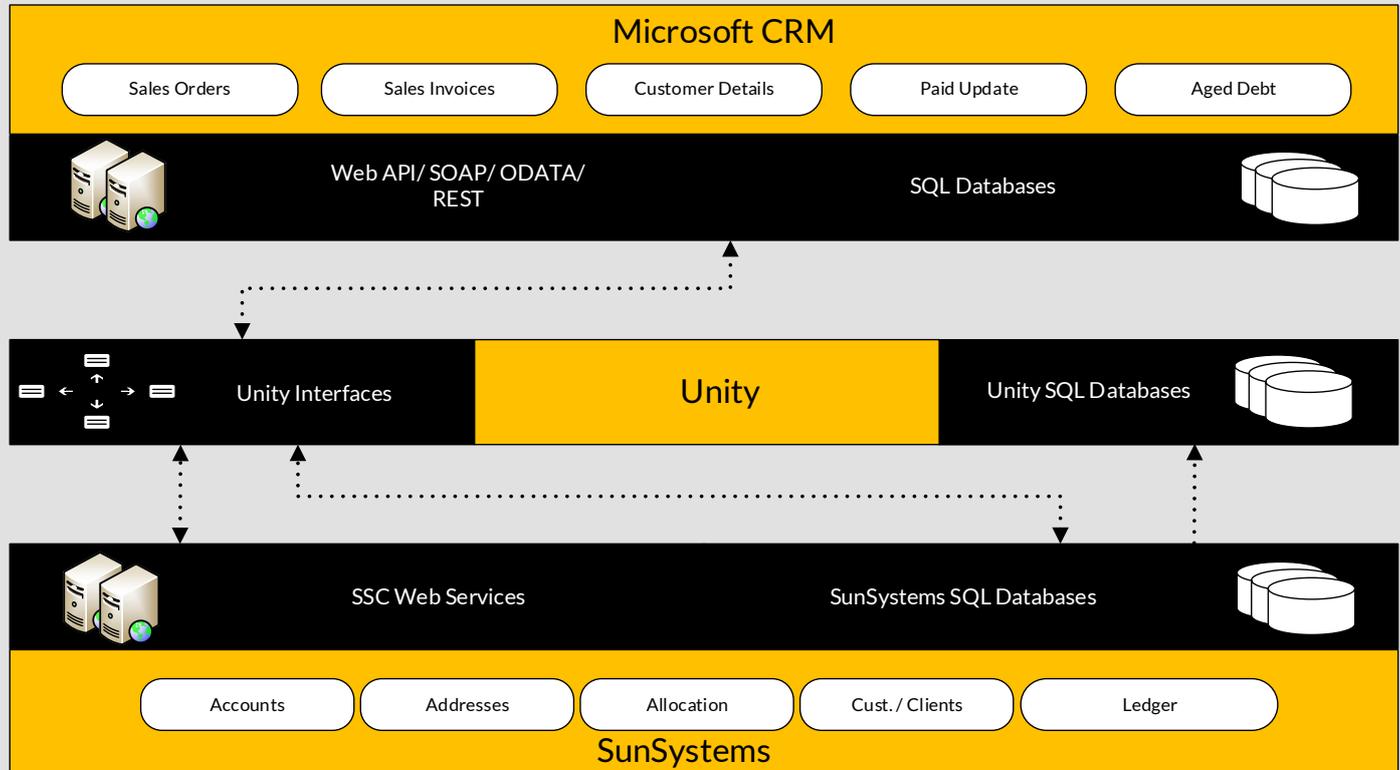
## Secure

User group permissions can be applied ensuring that users only have access to data and functions allocated to them. With full audit on the process including any amendments to data is reportable and easily viewable.



## Rules and Logic

Configurable and programmable rules and logic can be applied to the transactions allowing for reference data to be added or substituted ensuring that the correct information and reference data is used.



# Why ourshared Unity for SunSystems?



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ourshared Unity for SunSystems has been designed to allow easy, robust, proven, supportable integration to and from SunSystems and other third party apps. Automate the typical manual tasks of; downloading data from third parties systems, manually cleansing and changing data, manually uploading the data to SunSystems, or re-keying via journal entry.

## Why ourshared Unity for SunSystems:

- ✔ Dramatically reduce the need for the manual (re) keying of data whilst also improving the accuracy and consistency of data between systems.
- ✔ Achieve real-time visibility and synchronisation of key business reference and transactional data between applications and systems
- ✔ Ring-fence the technical and non-technical ownership of business data integration between individuals. Delegate issues and queries to the right team for efficient and productive day-to-day working.
- ✔ Powerful solutions can be deployed quickly and easily using global standards hosted on a robust, reliable and managed platform. Hybrid solutions can be created with less risk than a bespoke solution
- ✔ Designed to reduce both the development and on-going resource costs typically associated with systems integration

## Features at a glance:

- ✔ Scheduled, batch, event and/or real time integration between multiple systems built on a robust, extendable application framework
- ✔ Web interface management; audit and scheduling
- ✔ Email notifications success and failures

- ✔ Priority based queuing with parallel or in-line processing, out-of-the box resource allocation controls
- ✔ Service orientated and/or stand-alone self-contained integration solutions
- ✔ Can be scaled up and out to delivery truly scalable high availability
- ✔ Adds value and reduces ongoing costs for both simple and complex processes
- ✔ Data exchange solutions maintained and supported by experts

## Empower End Users:

Unity is designed to allow non-technical users the ability to interact with the integration process, by correcting data issues after validation, or to release records for processing manually all via a simple easy to use web interface.

- ✔ Primary user interface (zero footprint)
- ✔ Multi-user interface with role based permissions for access to job actions, schedules and runtime parameters
- ✔ Deliver customisable error messages to users
- ✔ Allow users to correct processing and reprocess data items within defined constraints
- ✔ KPI summaries of data processed
- ✔ Access to searchable audit history
- ✔ Allows manual interaction with data exchange process
- ✔ Presents runtime system logging messages to an administrator user
- ✔ Supports active directory single sign on

**For more information please contact us**

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